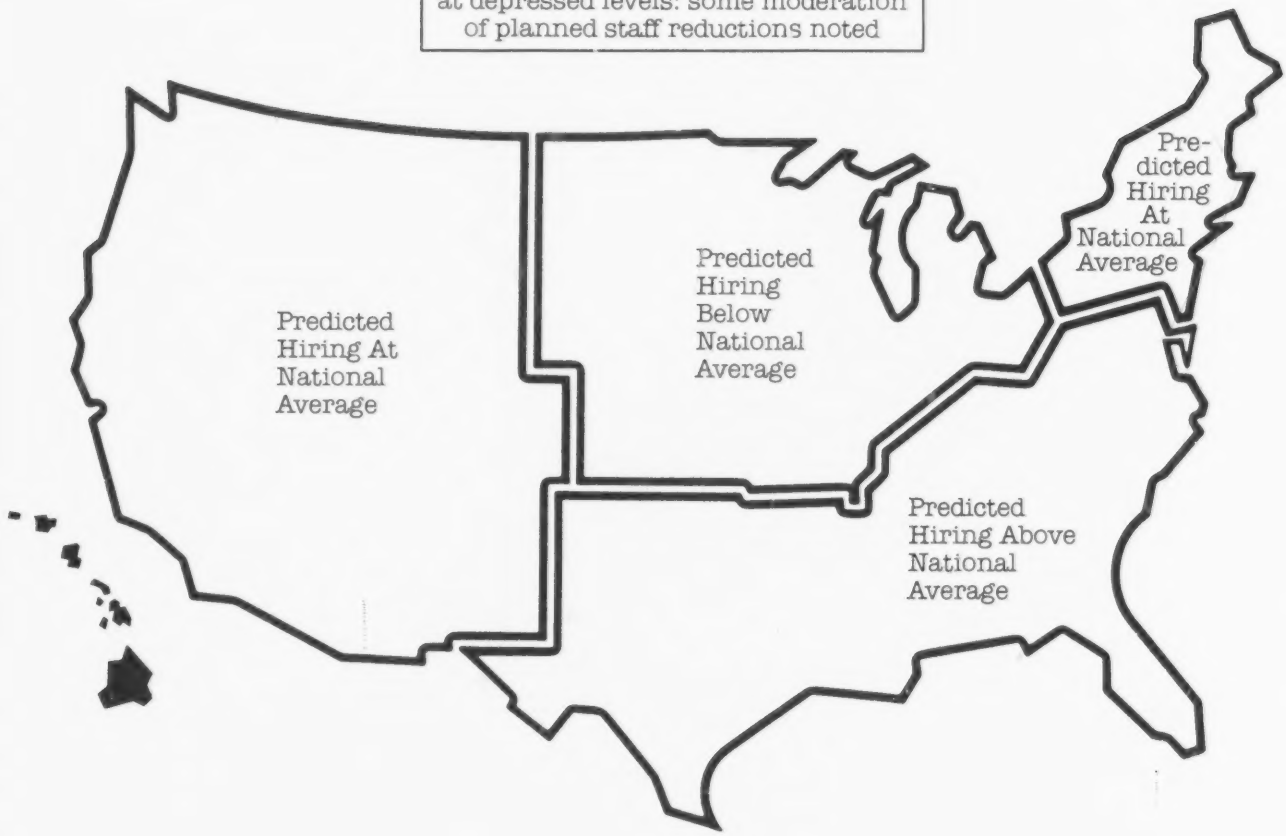
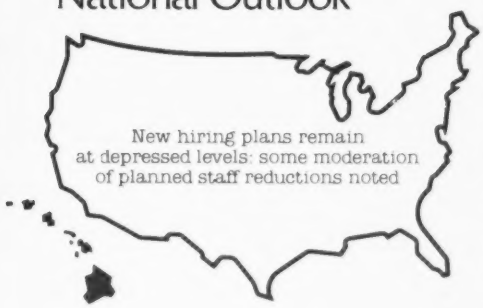
Manpower, Inc. Employment Outlook Survey

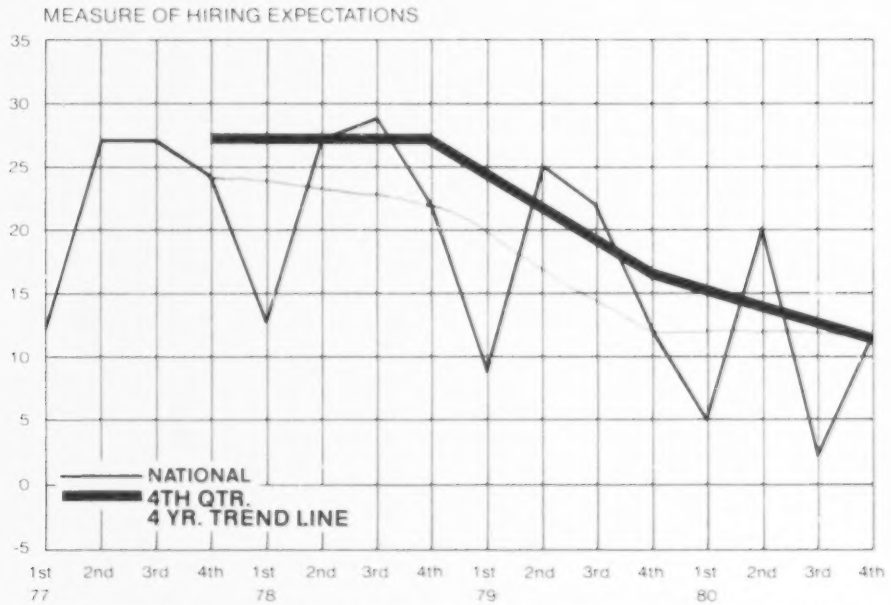
Fourth Quarter
October, November, December
1980

New hiring plans remain at depressed levels: some moderation of planned staff reductions noted


Predicted Hiring At National Average
Predicted Hiring Below National Average
Predicted Hiring At National Average
Predicted Hiring Above National Average

National Outlook





Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

Hiring plans during the fourth quarter of 1980 will remain at depressed levels. While the results reflect an improvement over last quarter's predictions, they are substantially below the fourth quarter levels of prior years.

The one bright spot in the survey is that the number of firms intending to decrease their staff reached a five-year high point last quarter. The fourth quarter 1980 figure is more promising and is the same level as indicated one year ago at the outset of the recession.

The level of those firms intending to add new employees is still below the fourth quarter of 1979. There is no clear evidence of a general upturn in hiring plans.

Durable goods manufacturing and construction firms are still the most prominent among the employment decrease predictions. Among heavy industry employers, fewer plan to add staff than reported last year at this time. Concurrently, substantially fewer firms plan to reduce staff.

Employers in the general manufacturing sector report figures that are well below last year's predictions and continue to linger at five-year low levels.

Fewer non-durable goods manufacturers plan to add staff than last quarter, but fewer plan to reduce staff.

Construction firms predicted a slightly lower hiring pace over last quarter, with figures equal to that of one year ago.

Some sharp seasonal increases are indicated, with better-than-anticipated rises reflected in the wholesale/retail sector and the services area. A substantially higher number of those employers plan to add employees than last quarter. Only a slightly higher number planned to add staff one year ago.

Services sector employees are more optimistic in their hiring plans than last year. Fewer firms plan staff increases in this quarter, but the results are slightly ahead of last year at this time.

Employers in the finance, insurance and real estate sector and those in the education sector have a slightly improved employment outlook.

Finally, transportation employers post similar figures to last quarter, but are slightly down from one year ago.

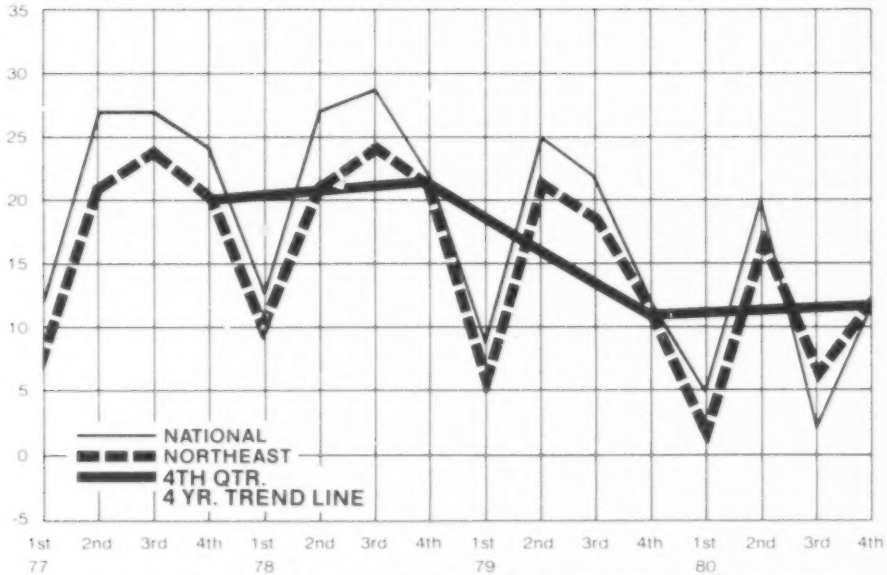
Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	35	59	3	3
Construction	19	57	19	5
Manufacturing – Durable Goods	19	62	14	5
Manufacturing – Nondurable Goods	16	68	12	4
Transportation & Public Utilities	20	62	14	4
Wholesale & Retail Trade	31	56	10	3
Finance, Insurance & Real Estate	22	69	7	2
Education – Public & Private	19	66	11	4
Services	23	66	8	3
Public Administration	14	70	12	4
All Industries	22	63	11	4

Note: These figures are not adjusted for seasonal variations.

Northeast

Connecticut
Maine
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

Employment expectations in the Northeast are slightly improved over last quarter although figures reported are slightly below last year during the same quarter. Overall, employment expectations reflect national figures and exhibit relatively greater resistance to staff reductions than employer plans measured elsewhere.

Manufacturers and wholesale and retailers are decidedly more optimistic this quarter than last and reflect substantial seasonal increases in their hiring expectations. Manufacturers of durable and non-durable goods both posted higher employment expectations last year at this time, however.

The finance, insurance and real estate industry sector posts increases in hiring expectations, higher than any of the past five-year quarter figures. Reductions in staff are predicted at the same rate as the last quarter, however.

Educators are optimistic in their hiring plans. Substantially greater numbers of employees will be added over last quarter, but figures still lag behind last year at this time.

The transportation and public utilities sector show slight improvement over last quarter and substantial improvement over last year's fourth quarter figures.

The construction industry continues to show depressed hiring expectations with more employers planning to reduce staff and a substantially lower number planning to add staff in the quarter. The hiring pace is the same, however, as last year at this same time.

Additionally, the services sector also expects to hire fewer employees than in the last quarter although the number is similar to those reporting additions and reductions last year at this time.

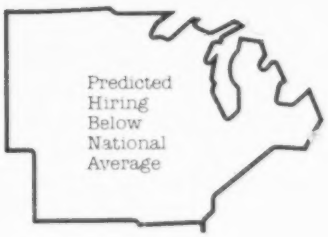
Expectations in the public administration sector are mixed with a lower number of employers planning to hire new employees, but a slightly lower number will reduce staff in the next quarter.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining*				
Construction	15	59	19	7
Manufacturing – Durable Goods	17	64	13	6
Manufacturing – Nondurable Goods	17	67	9	7
Transportation & Public Utilities	26	56	13	5
Wholesale & Retail Trade	31	53	10	6
Finance, Insurance & Real Estate	28	62	6	4
Education – Public & Private	20	66	7	7
Services	20	65	9	6
Public Administration	14	68	12	6
All Industries	21	63	10	6

Note: These figures are not adjusted for seasonal variations.

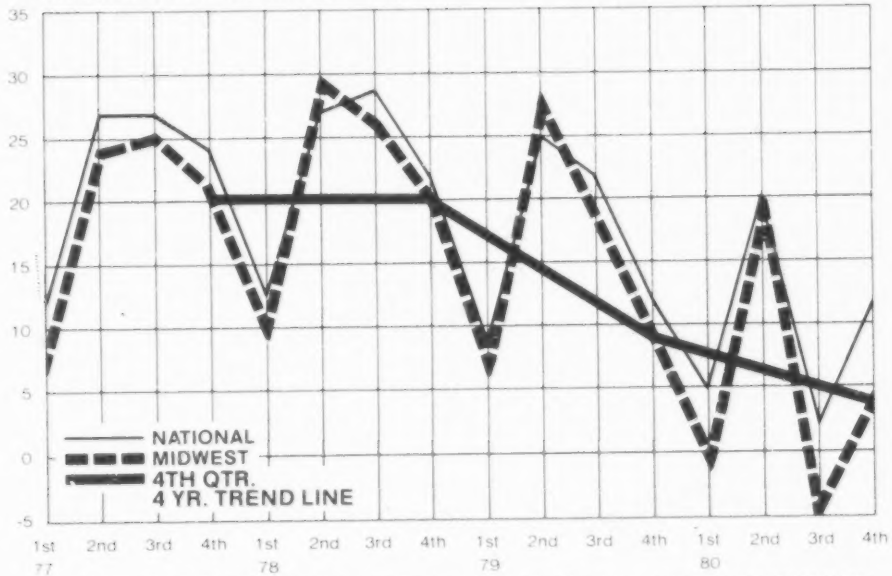
*The size of the mining industry's responding sample does not permit a hiring trend forecast.

Midwest



Illinois
Indiana
Iowa
Kansas
Michigan
Minnesota
Missouri
Nebraska
North Dakota
Ohio
South Dakota
Wisconsin

MEASURE OF HIRING EXPECTATIONS



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Regionally, the Midwest improved slightly over last quarter in its hiring expectations, but still reports figures well below last year during this same quarter.

Manufacturers of durable and non-durable goods expect a slight improvement over last quarter.

Wholesale and retail employers also post more optimistic figures, but they continue to be lower than those of fourth quarter 1979.

Finance, insurance and real estate employers expect improved hiring plans with figures even slightly higher than one year ago. Educators also are optimistic and post a jump in hiring plans over last quarter, but are still slightly behind last year's figures.

The mining industry employers polled are decidedly more optimistic this quarter than last and post even better results than last year at this time.

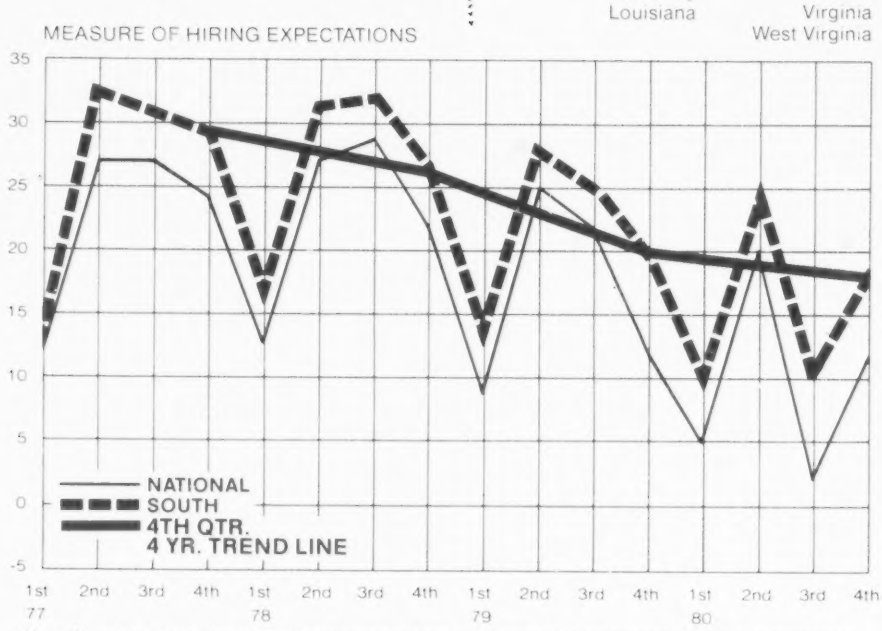
Employers in the transportation and public utilities and public administration sectors post mixed survey results. Fewer transportation firms plan to hire new employees, and slightly more expect to reduce staff. Fewer public administration firms plan to reduce staff, but plan increases at a slower rate than last quarter.

In the fourth quarter, both construction and services sectors report that fewer firms plan to hire additional employees to their staff. Slightly more construction firms expect to add staff over last year in this same quarter. Hiring for services expects to be at the same pace as last year's fourth quarter.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining*				
Construction	14	51	32	3
Manufacturing – Durable Goods	16	60	18	6
Manufacturing – Nondurable Goods	17	67	13	3
Transportation & Public Utilities	15	65	17	3
Wholesale & Retail Trade	29	58	10	3
Finance, Insurance & Real Estate	19	71	8	2
Education – Public & Private	21	64	11	4
Services	19	68	11	2
Public Administration	10	69	18	3
All Industries	19	63	15	3

Note: These figures are not adjusted for seasonal variations.
*The size of the mining industry's responding sample does not permit a hiring trend forecast.

Alabama
Arkansas
Delaware
District of Columbia
Florida
Georgia
Kentucky
Louisiana
Maryland
Mississippi
North Carolina
Oklahoma
South Carolina
Tennessee
Texas
Virginia
West Virginia



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The South continues to post the most optimistic employment expectations, markedly ahead of those nationally.

The wholesale/retail and manufacturers of durable goods are most optimistic of all the sectors polled. A substantial increase in the number of employers planning to add staff in the fourth quarter of 1980 is expected. This hiring pace is similar to that posted one year ago.

In this quarter the mining industry is also improved with a substantially greater number of employers planning to add new employees. The hiring pace is still slightly behind last year at this same time. No mining firm reports plans to reduce staff although a few did one year ago at this time.

Construction employers expect a decline in the number of new employees hired in the fourth quarter although no new employers expect to reduce staff.

Service firms report relatively the same results as last quarter which show a slight improvement over last year's figures at this same time.

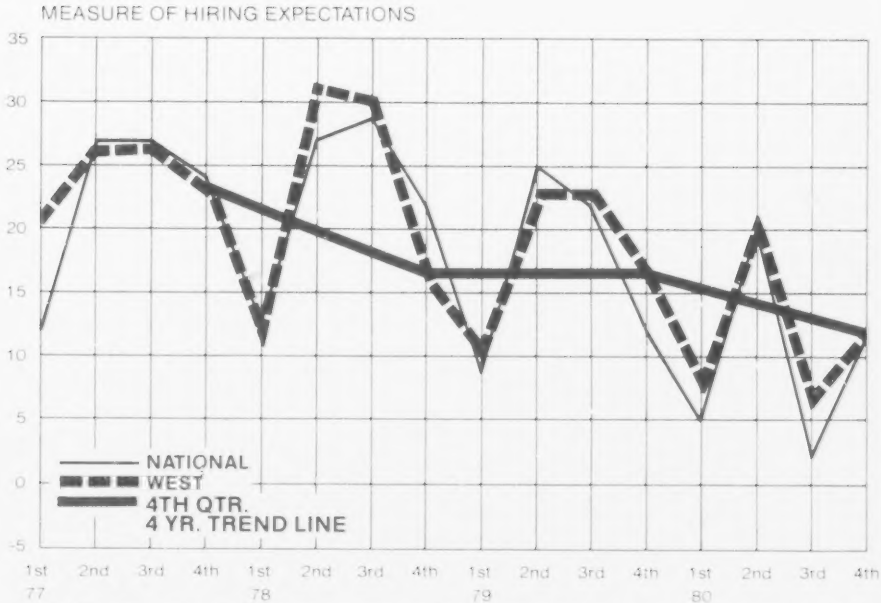
All other business sectors are mixed. In this quarter, fewer non-durable goods manufacturers will add to their present staff, but fewer will reduce their staff. The same is true for the transportation, finance, education and public administration sectors. All lag behind figures posted one year ago.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	46	54		
Construction	24	56	16	4
Manufacturing – Durable Goods	25	62	11	2
Manufacturing – Nondurable Goods	18	68	12	2
Transportation & Public Utilities	20	65	10	5
Wholesale & Retail Trade	34	55	8	3
Finance, Insurance & Real Estate	20	71	6	3
Education – Public & Private	19	66	10	5
Services	31	59	7	3
Public Administration	14	74	7	5
All Industries	26	63	8	3

Note: These figures are not adjusted for seasonal variations.

West

Arizona
California
Colorado
Hawaii
Idaho
Montana
Nevada
New Mexico
Oregon
Utah
Washington
Wyoming



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

Employers in the West reflect an improvement in their survey results over last quarter and are slightly more optimistic than the national employment outlook.

Greatest employment optimism is posted by wholesale and retail manufacturers whose figures are improved, but still lag behind those polled last year for this same quarter.

The finance, education and public administration sectors also indicate an improved employment outlook. Substantially more finance, insurance and real estate employers will hire than last quarter increasing to the level of hiring activity one year ago at this same time. Educators, too, plan a jump in staff increases but are well behind figures of last year in the same quarter. No increases in staff additions are planned for the public administration sector, although the number of employers planning to decrease staff numbers has diminished substantially since last year at this time.

Transportation and public utilities employers expect few changes this quarter and have about the same figures as last year at this time.

In the next quarter, non-durable goods manufacturers expect a drop in hiring plans, but figures are slightly ahead of the hiring pace last year at this time.

Services employers also expect a slight decline in hiring plans, but the figure is at the same level as one year ago.

Employers in the mining, construction and manufacturers of durable goods have mixed survey results. Mining companies expect to hire fewer new employees, but fewer staff will be reduced. The same is expected by construction firms. Manufacturers expect a slight increase in the number hiring new employees, but more plan to reduce staff.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining		66	17	17
Construction	20	62	12	6
Manufacturing Durable Goods	25	54	18	3
Manufacturing Nondurable Goods	15	65	15	5
Transportation & Public Utilities	24	60	15	1
Wholesale & Retail Trade	31	58	9	2
Finance, Insurance & Real Estate	29	63	7	1
Education Public & Private	18	64	17	1
Services	23	64	10	3
Public Administration	16	73	10	1
All Industries	23	62	12	3

Note: These figures are not adjusted for seasonal variations.

MANPOWER
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The quarterly Employment Outlook Survey is conducted as a public service of Manpower, Inc. The survey was designed and is administered by Manpower's International Research Department, utilizing a statistically representative sample of approximately 8,000 large public and private employers from among ten industrial sectors in more than 250 U.S. cities.

The Survey is a measurement of employment plans for the permanent workforce and is based upon telephone interviews conducted with the survey sample immediately prior to the conclusion of the preceding calendar quarter.

The Survey results reflect the intentions of the sample of employers interviewed. Some of these intentions may change unexpectedly upon the conclusion of the survey.